



Direct Authorization Vendor's CalPERS ID File Exchange Layout

Unique Identifiers Cutover Approach

Version History

Document Version	Document Revision Description
1.0	Initial Draft
1.0	Revised for Initial Draft for DAVs
2.0	Revised wording pertaining to timing of files being sent.
3.0	Revised wording at the end of section 3, regarding the two versions of CalPERS ID files to be sent.
4.0	Made updates to indicate "NUL" will be used instead of a comma enclosed space to indicate unpopulated fields.
5.0	Updated layout to include DED ID Code and changed Participant Deduction Amount to Participant Deduction Frequency

1. DESCRIPTION

This document describes the approach for providing business partners with the unique IDs they need to communicate Direct Authorization deduction requests to CalPERS.

2. BACKGROUND

The my|CalPERS system relies on randomly generated 10-digit, unique identifiers to specifically identify participants and business partners. The majority of unique identifiers currently sent to CalPERS in deduction files will not be used going forward in my|CalPERS. Examples include the following:

TYPE	CURRENT IDENTIFIER(S)	REPLACED BY
Participant	SSN	CalPERS ID (Participant)
Organization	Carrier Code	CalPERS ID (Business Partner)

This document describes the approach identified for providing deduction processors with the identifiers required for reporting to my|CalPERS post-implementation.

3. APPROACH

The file created for each deduction processor will be a comma delimited file that may be used by the employer to update their systems and/or store the information accordingly. If a field is not populated then it will default to a value of 'NUL' as shown in the example below:

- Sponsor,...,NUL,NUL,City Of Garden Grove,22334455,Kaiser,NUL,NUL,23453456,...

A separate file will be created by Direct Authorization deduction processor containing the following information:

FIELD	DATA TYPE	LENGTH	DESCRIPTION/NOTES
BP Responsible for Deductions	String	80	Sponsor, carrier, or third party administrator
Agreement ID	Number	10	The ID of the Direct Authorization Agreement between the sponsor and CalPERS allowing the submission of deductions
DED ID Code	String	12	The legacy Deduction ID Code used to identify the agreement
BP CalPERS ID (Sponsor)	Number	10	The CalPERS ID of the sponsor that holds the Direct Authorization Agreement with CalPERS.
BP Name (Sponsor)	String	80	Deduction processor can use the sponsor BP Name to confirm that the correct sponsor is identified
BP CalPERS ID (Carrier)	Number	10	The CalPERS ID of the Direct Authorization carrier in my CalPERS
BP Name (Carrier)	String	80	Deduction processors can use the carrier BP Name to confirm that the correct carrier is identified
BP CalPERS ID (Third Party Administrator)	Number	10	The CalPERS ID of the third party administrator responsible for submitting deductions on behalf of a carrier or sponsor

FIELD	DATA TYPE	LENGTH	DESCRIPTION/NOTES
BP Name (Third Party Administrator)	String	80	Deduction processors can use the third party administrator BP Name to confirm that the correct third party administrator is identified
Participant CalPERS ID	Number	10	Provides the deduction processor with the CalPERS ID that represents the participant in myCalPERS
Participant SSN	Number	9	Deduction processors can use the SSN to match to a participant in their systems
Participant Last Name	String	30	Deduction processors can use the Last Name to match to a participant in their systems
Participant First Name	String	20	Deduction processors can use the First Name to match to a participant in their systems
Program	String	3	The program under which the participant is receiving a benefit
Payee Account ID	String	3	If available
Participant Deduction Type	String	3	Deduction processors can use the Deduction Type to match a participant to a specific agreement in their systems
Participant Deduction Frequency	String	3	Deduction processors can use the Deduction Frequency to match a participant to an agreement or Deduction Type in their systems

This file will be generated and provided to each deduction processor via encrypted email or CD in two separate instances:

1. The first version of this file will be generated one month prior to file readiness testing. The file will contain actual participant data, and the unique identifiers will match appropriately in the file readiness environment to allow deduction processors to test sending deduction requests prior to the launch of myCalPERS. However, the unique identifiers may not match final production data; in this case, you will need to overwrite the identifiers with the data provided in the second version.
2. The second version of this file will be generated approximately six weeks prior to the launch of myCalPERS. The unique identifiers generated in this version of the file will be converted into production. Deduction processors will be expected to use the identifiers provided in this file to update their systems in order to submit their deduction requests commencing with the launch of myCalPERS.

Notes:

- Deduction processors will not receive a file containing unique identifiers for retirees with new deductions submitted after the generation of the second file.
- Deduction processors are expected to run a report to determine the CalPERS ID for these retirees after the launch of myCalPERS.